

erwin DI Suite

Codeset Manager

Quick Start User Guide – v9.3

Getting Started

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- ✓ Maintaining Enterprise Codesets [Click](#)
- ✓ Maintaining Code Crosswalks/Mappings [Click](#)

About Codeset Manager

The erwin DG Codeset Manager® helps drive the standardization of Code Sets across an enterprise.

The Codeset Manager lets you import legacy Code Sets across multiple source systems and standardize these Code Sets. The Codeset Manager contains interfaces to easily import legacy code sets through its upload and database scanning capabilities. The Codeset Manager allows customers to build and version Code Mappings to drive the standardization process and review changes to the Code Mappings.

Quick Access Section

Maintaining Enterprise Codesets

- ✚ Categorize Codesets and define Code Values
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- ✚ Publish Codesets to various deployment Environments [Click](#)
- ✚ Define Publishing Environments [Click](#)
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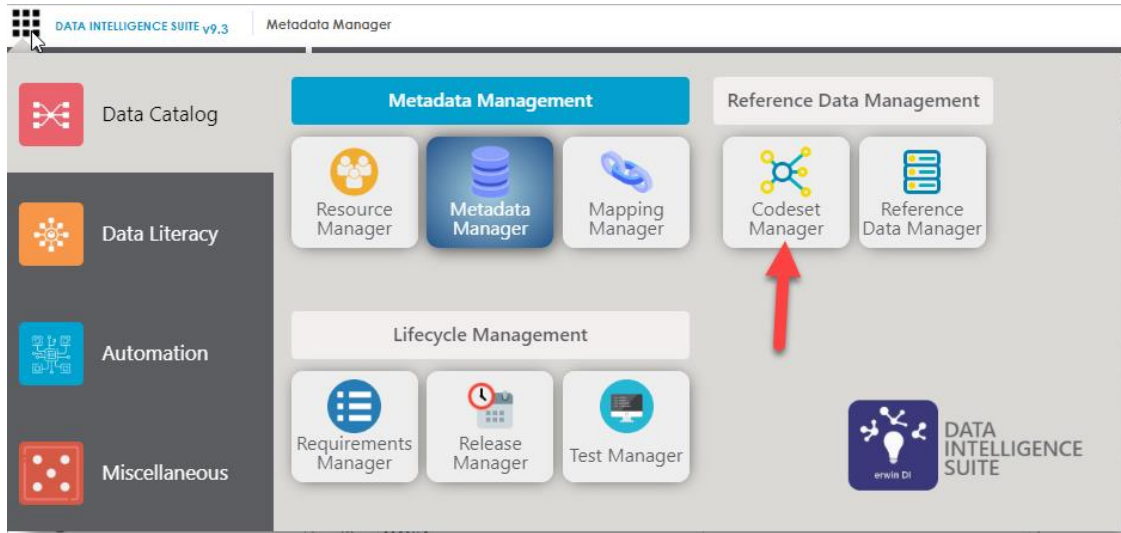
Maintaining Code Crosswalks/Mappings

- ✚ Categorize Code Mappings and define Code Crosswalks [Click](#)
 - Categorize Code Mappings [Click](#)
 - Create Category [Click](#)
 - Update Category [Click](#)
 - Delete Category [Click](#)
 - Create Code Crosswalks [Click](#)
 - Auto Map Source Target Codes [Click](#)
- ✚ Version Code Crosswalks [Click](#)
- ✚ Publish Code Mappings to various deployment Environments [Click](#)
- ✚ Copy and Paste Code Mappings [Click](#)
- ✚ Associate a Code Crosswalk to a Data Item Mapping in the Mapping Manager module [Click](#)

Global Search across Codeset Repository [Click](#)

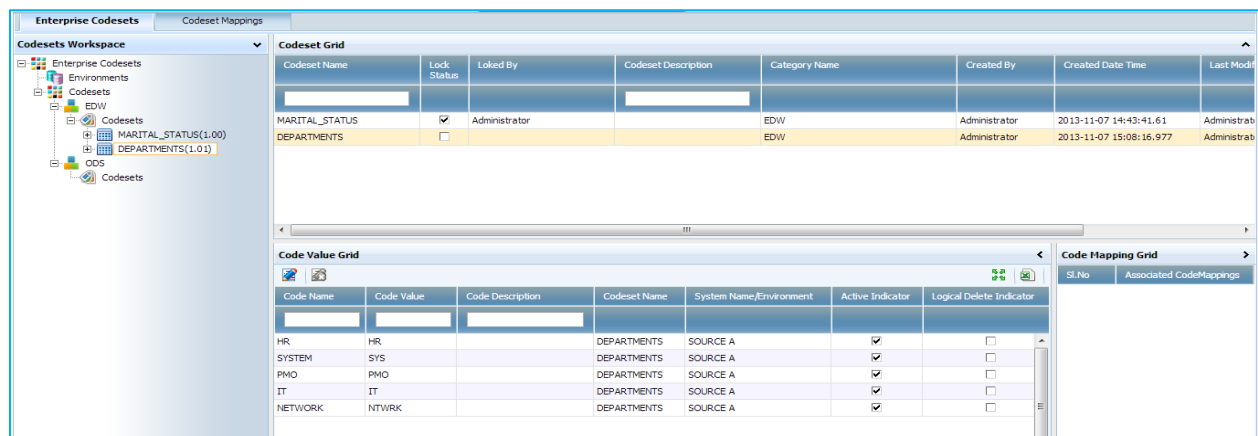
GUI and Screen Layout

Click on the "Codeset Manager" icon in the Slider menu to access the Codeset Manager module



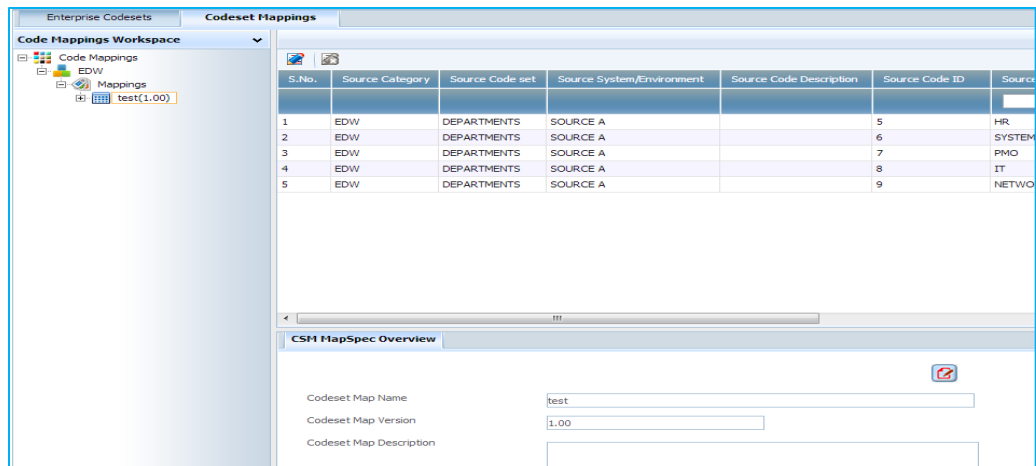
Access to Codesets is provided using the "Enterprise Codesets" tab

- Codesets are grouped into Categories
- Categories can contain nested Sub-Categories
- Large Codesets can be scanned from Excel templates or directly out of databases using DB Scanning



Access to Code Crosswalks/Mappings is provided using the "Codeset Mappings" tab

- Code Crosswalks/Mappings are grouped into Categories
- Legacy Code Crosswalks/Mappings can be imported using Excel Templates



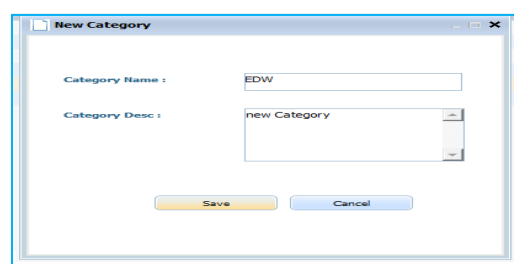
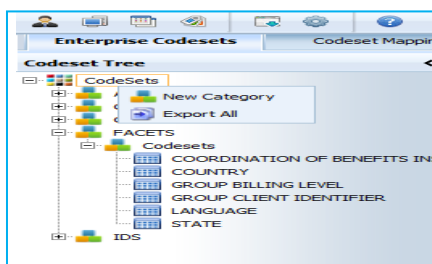
Maintaining Enterprise Codesets

- ✚ Categorize Codesets and define Code Values
- ✚ Version Codesets
- ✚ Copy/Paste Codesets
- ✚ Publish Codesets to various deployment Environments

Categorize Codesets and define Code Values

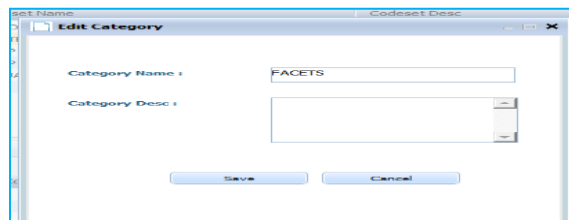
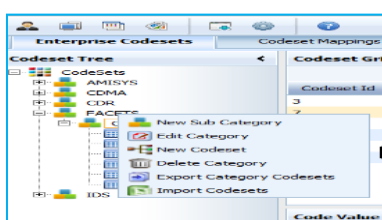
Create Categories

1. Right click on the "**CodeSets**" node and click "**New Category**"
2. Enter the "**Category Name**" and "**Category Description**" and click the "Save" button. New Category is successfully created.
3. Sub Categories can be created within Categories. Right click on a Category and select the "New Category" option to create a sub Category.



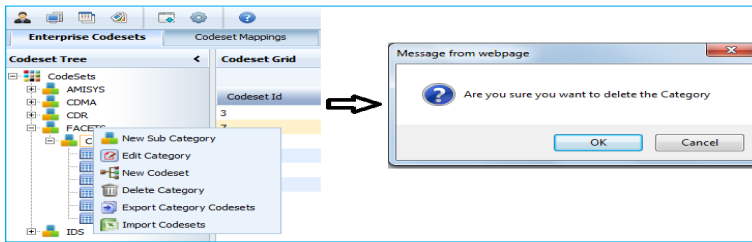
Update Categories

1. Right Click on a Category (e.g. Facets) and select the "Edit Category" option.
2. Enter the required details and click the "Save" button. The changes are successfully updated.



Delete Categories

1. Right click on a Category (e.g. FACETS) and select the "Delete Category" option
2. A confirmation dialog box is displayed. Click OK to proceed and CANCEL to abort

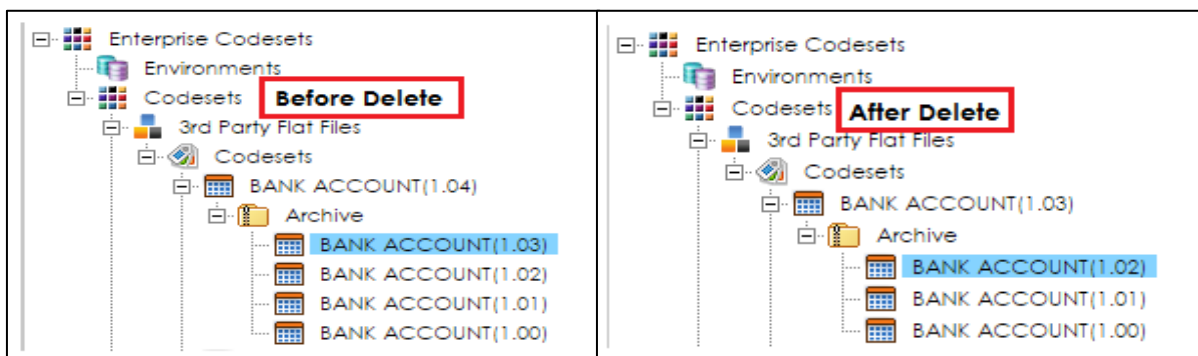
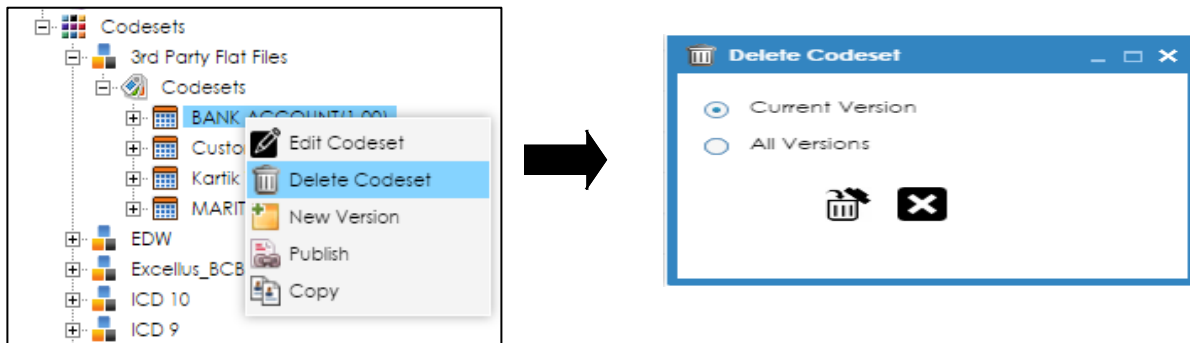


Delete Codesets:

▪ Deleting a Single Codeset

The Codeset Manager allows deletes for the purposes of housecleaning (incomplete and irrelevant codesets) and to roll back to a previously versioned state. Users have the ability to delete all versions (discard all versions) or to delete only the current version. Deleting the current version removes current version and makes the previously versioned mapping specification the current version

1. To delete, right click on a Codeset and select the "Delete Codeset" option
2. From the dialog box, select the option ("Current Version" vs "All Versions") and click on the Delete '🗑️' icon.
 - a. Choose **Current Version** to delete the current version and revert to the previously versioned Codeset (E.g. rollback to the previous version)
 - b. Choose **All Versions** to remove the current Codeset and all contents of the archived folder (previously versioned Codesets).




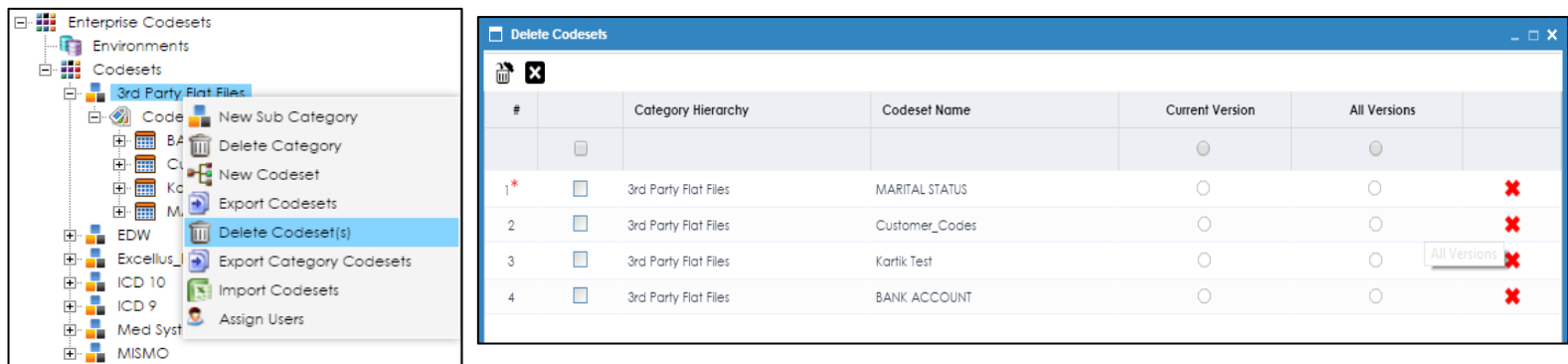
The screenshot illustrates a before and after view showing the rollback to the previous version







Choosing All Versions should only be used as a house-cleaning function as the Codeset and all previous versions will be permanently deleted.

■ Delete Multiple Codesets

1. To delete multiple Codesets, right click on a Codeset Category and select the "Delete Codeset(s)" option
2. In the dialog box, select the option ("Current Version" vs "All Versions") for the Codesets you want to delete and click on the Delete '  ' icon



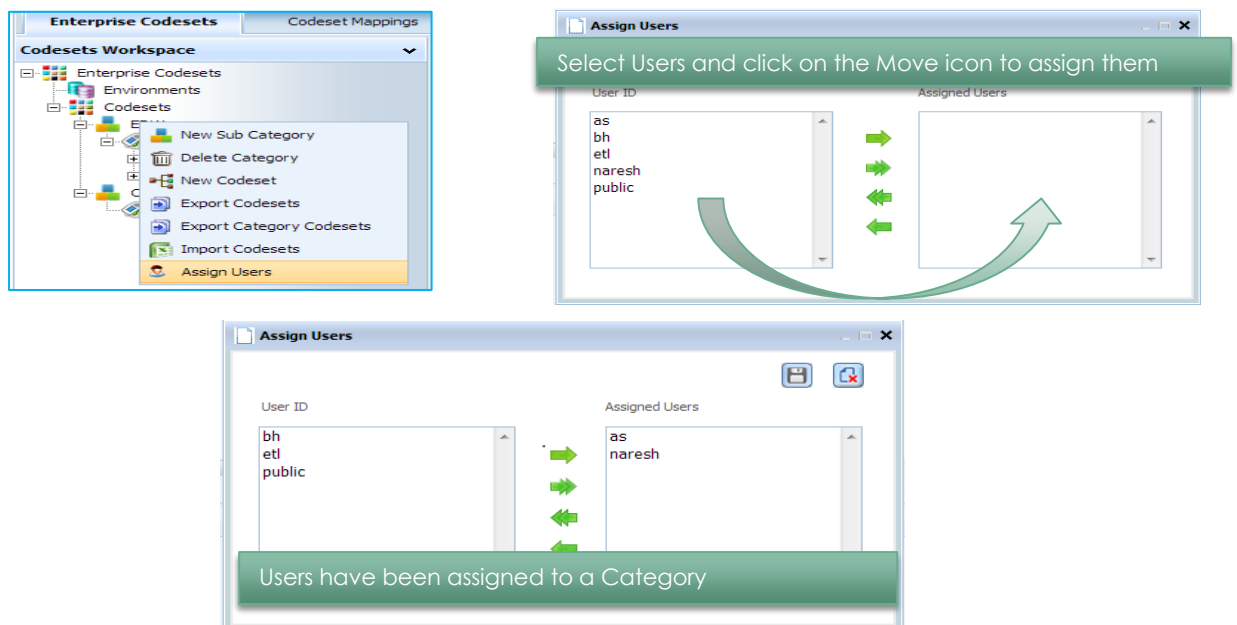
The screenshot shows the 'Enterprise Codesets' tree on the left with '3rd Party Flat Files' selected. The context menu is open, showing 'Delete Codeset(s)'. The 'Delete Codesets' dialog box is open on the right, displaying a table of codesets to be deleted.

#		Category Hierarchy	Codeset Name	Current Version	All Versions	
1*	<input type="checkbox"/>	3rd Party Flat Files	MARITAL STATUS	<input type="radio"/>	<input type="radio"/>	
2	<input type="checkbox"/>	3rd Party Flat Files	Customer_Codes	<input type="radio"/>	<input type="radio"/>	
3	<input type="checkbox"/>	3rd Party Flat Files	Kartik Test	<input type="radio"/>	<input type="radio"/>	
4	<input type="checkbox"/>	3rd Party Flat Files	BANK ACCOUNT	<input type="radio"/>	<input type="radio"/>	

Associate Users at Root Category Level

1. To associate users to a root Category, right click on the Category and select the "Assign Users" option
2. The list of existing Users are displayed under the "Available Users" section. The list of Users associated with the Category are displayed under the "Assigned users" section. This section will be blank the first time you go in to associate Users to a Category.
3. To associate Users to a Category, select the required users (you can select multiple rules) using the shift/control keys and "Drag n Drop" them from the "Available users" section to the "Assigned users" section.
4. Click the Save icon when done

Note: Assigning Users to a Category will give them write access to all sub folders and codesets within that root category. Follow the same procedure if you need to add/remove users to/from the category



The screenshot shows the 'Enterprise Codesets' tree on the left with 'Codesets Workspace' selected. The context menu is open, showing 'Assign Users'. The 'Assign Users' dialog box is open on the right, displaying a list of users to be assigned.

Assign Users

Select Users and click on the Move icon to assign them

User ID: as, bh, etl, naresh, public

Assigned Users: (empty)

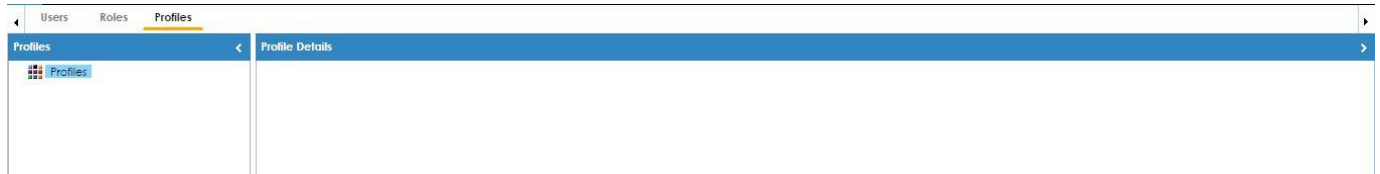
Users have been assigned to a Category

Managing Profiles

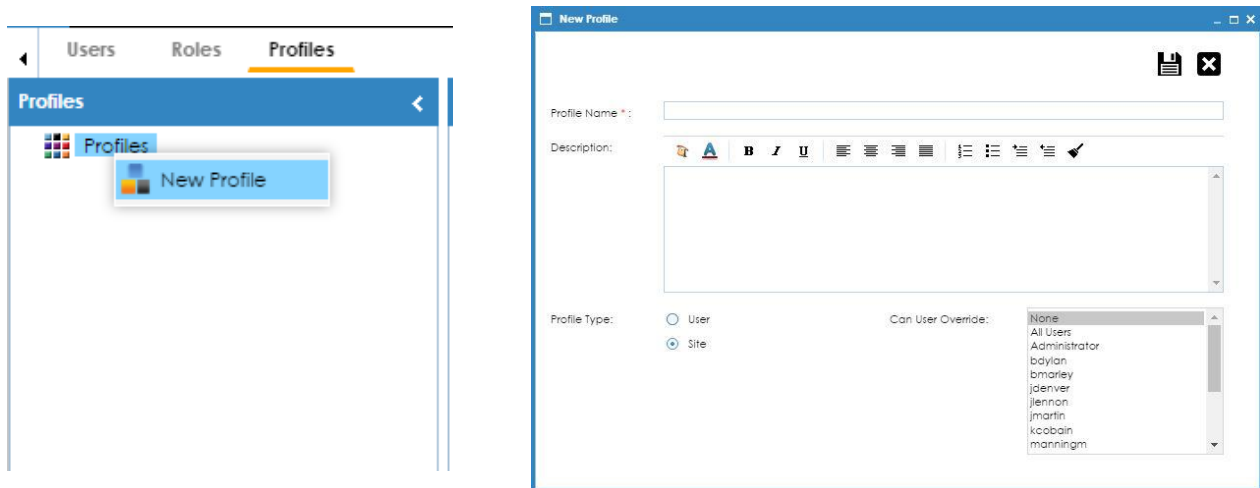
▪ Codeset Grid Profiles & Customization under Resource Manager Module.

Configuring the Codeset Grid i.e. display and order of Columns to enforce best practices and consistent use among project teams. Multiple Profiles can be created for the Codeset Grid by an Administrator or the end user. Users can toggle between multiple profiles and view the Codeset grid accordingly

Under Resource Manager Module, Click on Profiles



Right Click on Profile node to create a new profile.



Profile Type:

When logged into the tool with "Administrator" login, you will get both User and Site options while defining the profile whereas for normal logged on user based on the role/permissions defined he/she could get to see either user or site profile type.

- **User:** User is a normal user profile. Based on the permissions defined you can create either site or user profile. If the user is an admin than the logged on user can see both profile types.

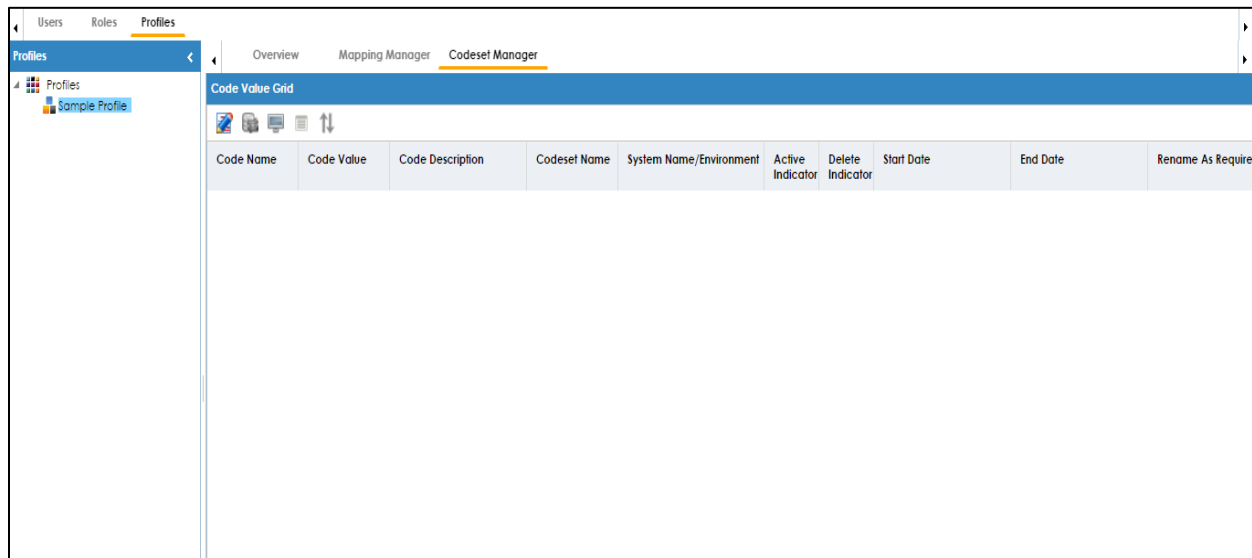
- **Site:** Site is an Admin profile where you have an option to create can any desired profile and can see both profile type options.


Enter Profile Name and select the profile type (Site) with the users you want to override or select "None" option if required and click on save icon to create the profile.

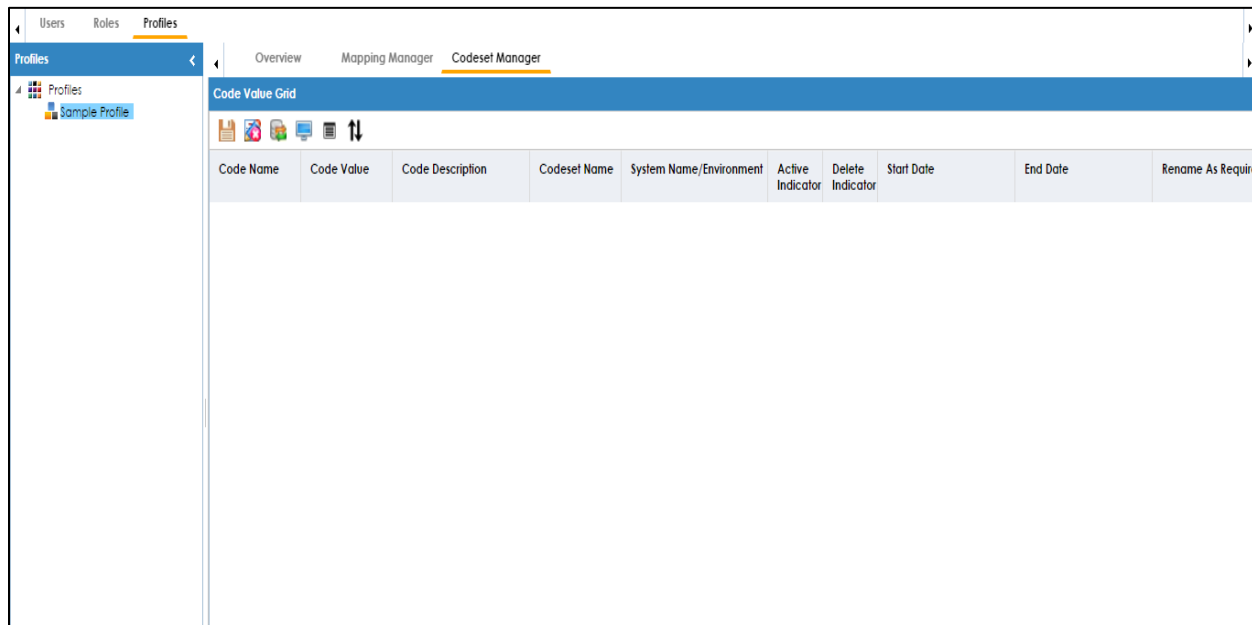
Once you select "Site" option it gives you list of users under "Override User list", this option allows the selected users to override the default grid setting with a setting of their choice and these changes will be auto saved when a new profile is created.

Once the profile gets created, you can go to overview tab to edit and do the modifications to the profile and save it.





Now, click on Codeset Manager Tab to customize the header menu and add the required fields to the Codeset grid.



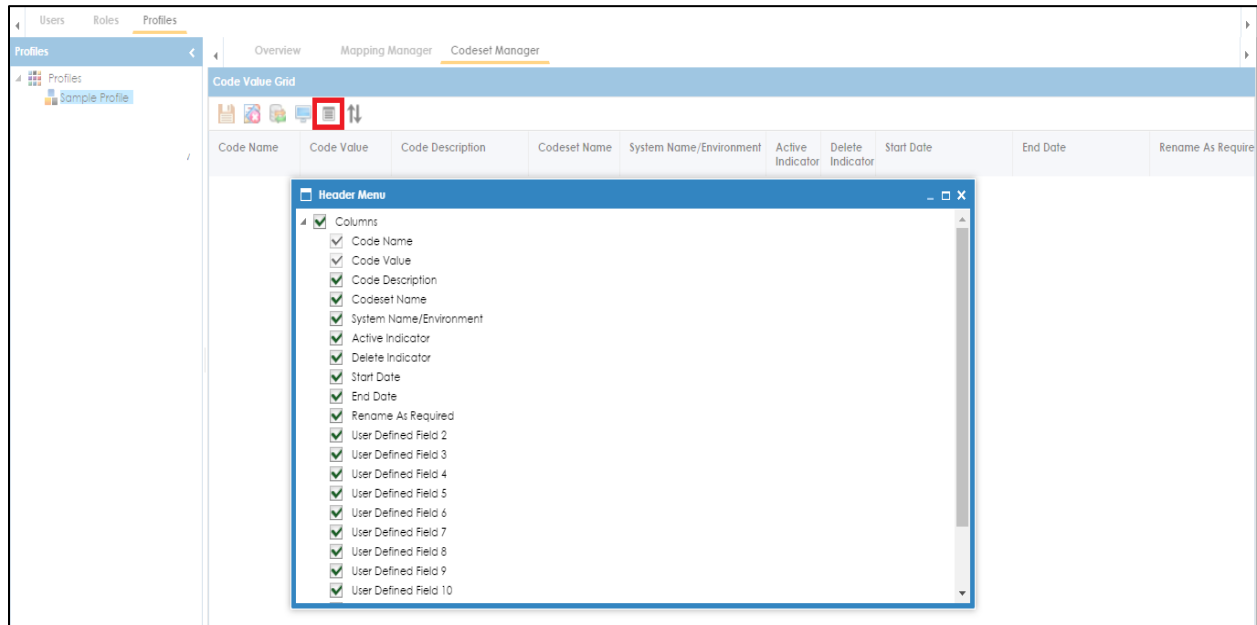
Click on the Edit icon  to edit the Codeset grid for customization.



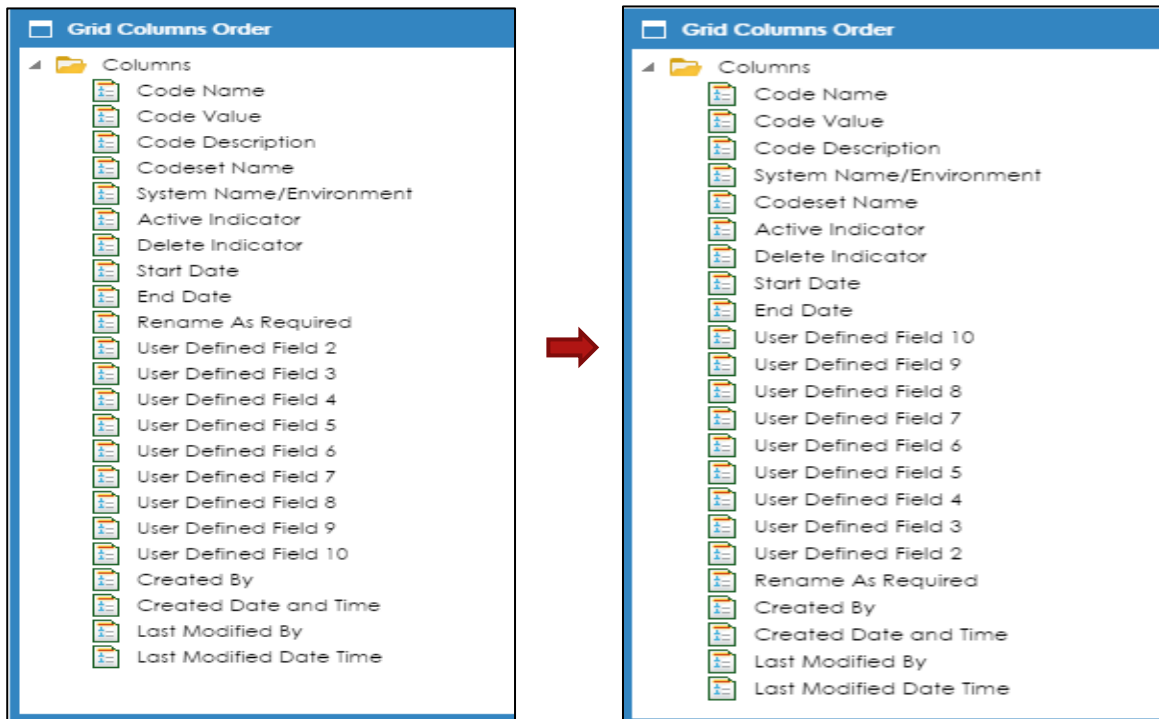
Code Value Grid – Under this you have icons to customize the Codeset Grid i.e.

-  Reset Column Ordering - Click the icon to reset the column ordering to default.
-  Reset Columns Visibility - Click the icon to reset the hidden columns under mapping grid to visible.
-  Header Menu - Click "Header Menu" option to customize the mapping grid header menu and have provision to select the required columns.
-  - Change Column order - Click the icon to rearrange the columns order based on your requirement.

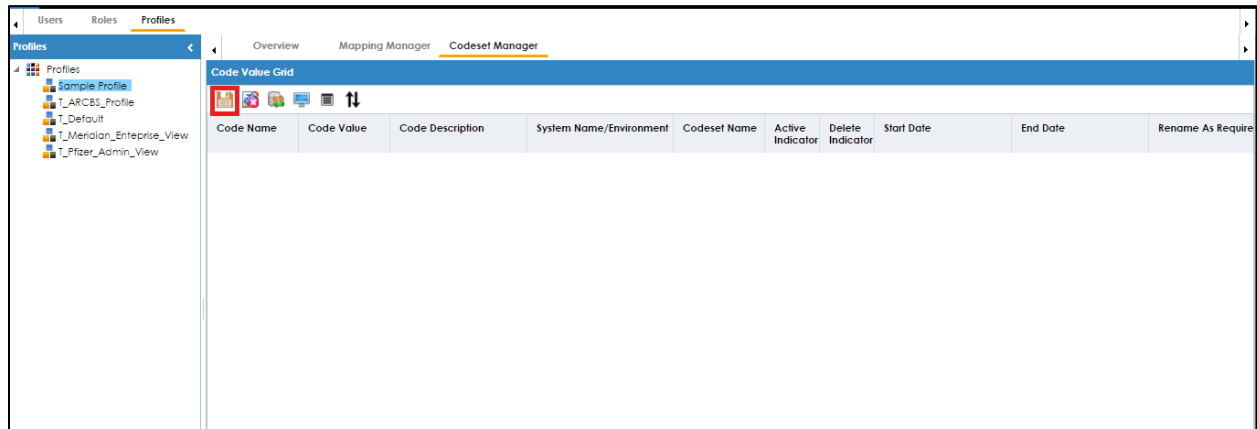
Click on "Header Menu" icon and select the required columns to be seen under Codeset grid.



Click on 'Change Column order' icon to rearrange the columns order based on your requirement. Drag and drop the column to the required position.



Once changes are done, click on save icon to save the Codeset customized view.

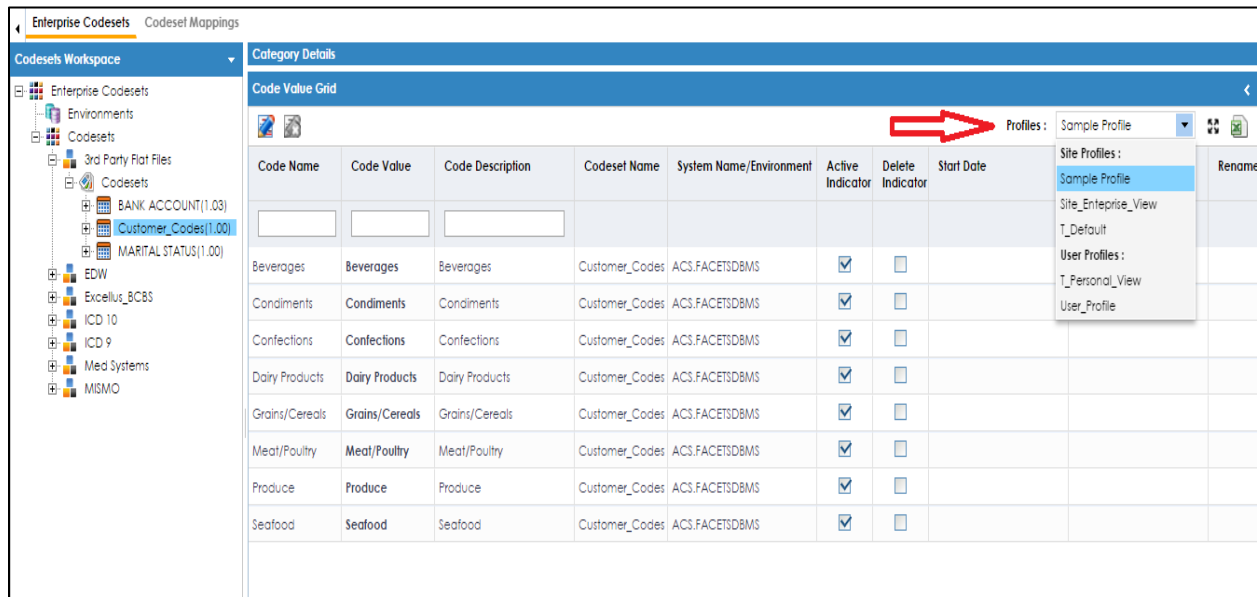


You can see the list of profiles created as below

S.No	Profile Name	Profile Type	Created By	Created Date Time	Last Modified By	Last Modified Date Time
1	Sample Profile	Site	Administrator	2016-09-18 18:49:12.723	Administrator	2016-09-18 18:49:12.723
2	Test User Profile	User	Administrator	2016-09-18 19:04:37.33	Administrator	2016-09-18 19:04:37.33

Now, Go to Codeset Manger module -> Expand Codeset Category.

Click on a Codeset and select the defined profile under "Profiles" dropdown.









If logged in with "Administrator" you can view both Site and User Profiles. Select the profile to customize the mapping grid as defined profile.

About Enterprise Codesets

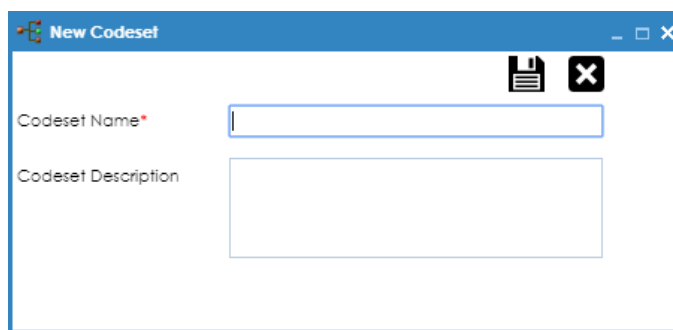
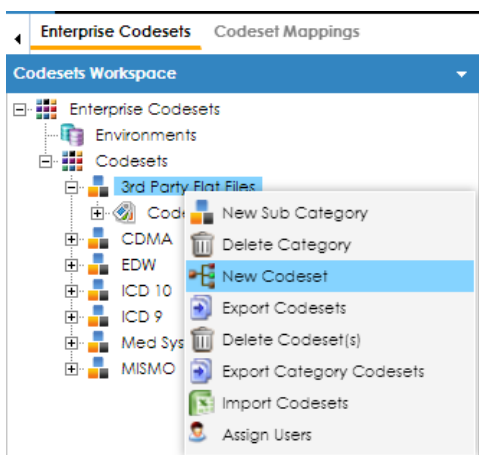
The Codeset Manager lets you create and maintain Codesets from various source systems/Environments. You can create your Codeset, add codename and value pairs and maintain the associated information. The Codesets can then be published to various environments like DEV, TEST and PROD, Versioned, Copied and most importantly used to create Code Crosswalks / Mappings.

GUI Context Menu options

-  **Edit Codeset** – Edit Existing Codeset Properties
-  **Delete Codeset** – Delete Codesets
-  **New Version** – Create a new version of the Codeset
-  **Publish** – Publish Codeset to various deployment environments
-  **Copy** – Create a copy of a Codeset for alternate usage
-  **Retire** – Retire the Codesets

Add New Codeset

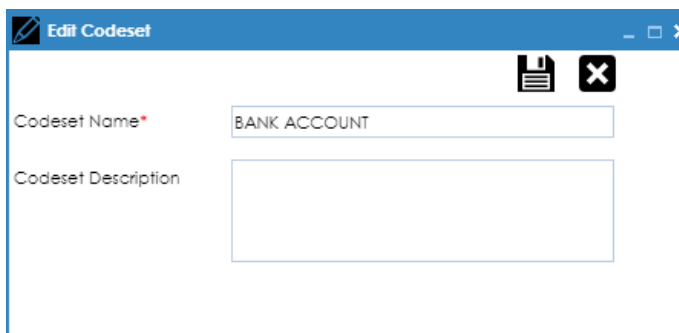
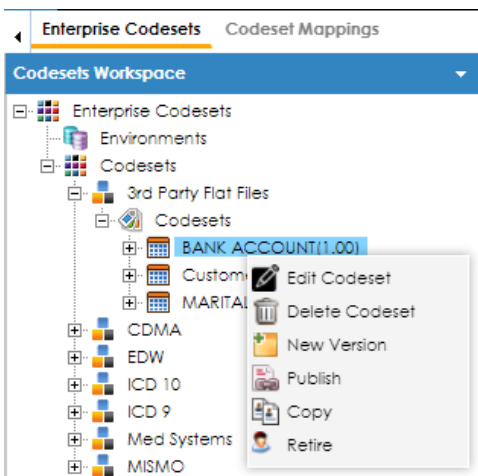
Right Click on a Category e.g. EDW and select the “New Codeset” option. A Pop Up screen opens displaying the list of fields to create a new Codeset.



Enter the required information and click the SAVE icon.

Edit Codeset

Right Click on a Codeset e.g. BANK ACCOUNT and select the “Edit Codeset” option. A Pop Up screen opens displaying the existing Codeset properties.

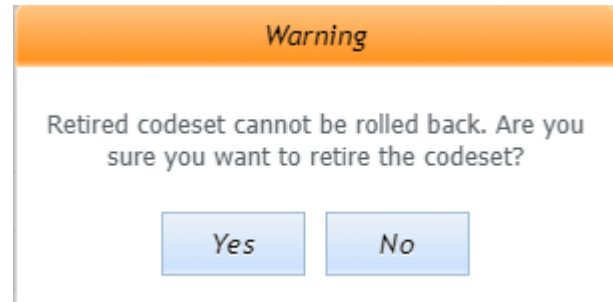
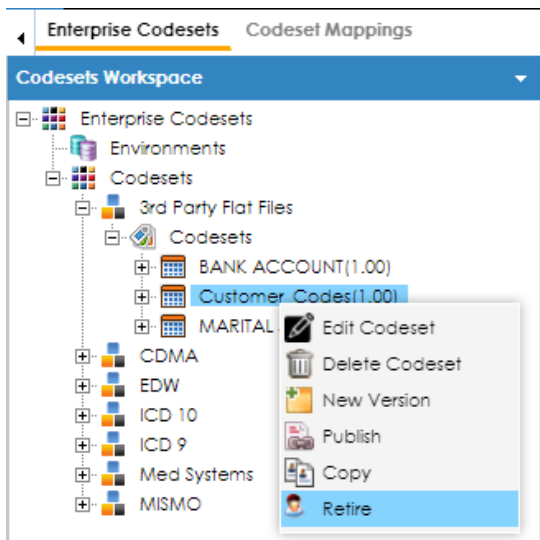


Modify the required information and click the SAVE icon.

Retire Codeset

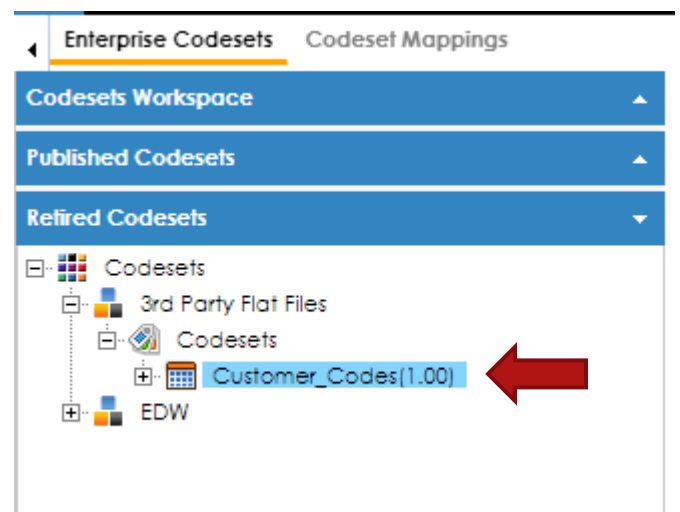
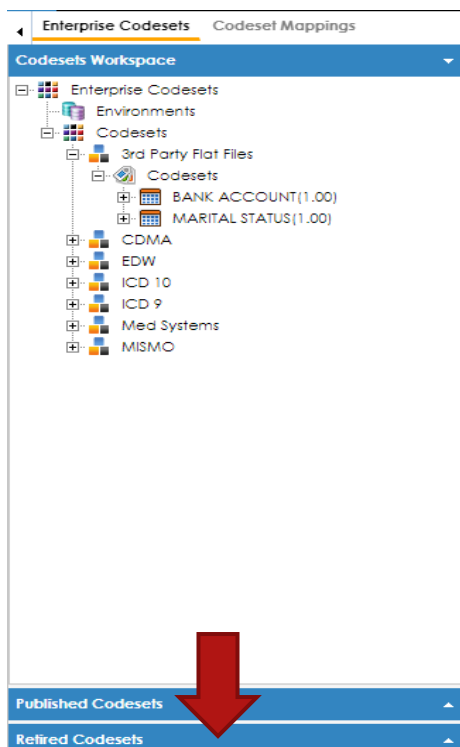
The Codesets which are moved to Retired Codesets section under Enterprise Codesets. Once the Codesets are retired, they are unused and cannot be rolled back.

Right Click on the Codesets and Click on "Retire" option



Click "YES" to retire the selected codesets. The retired codesets cannot be rolled back.

Codesets are successfully retired and are moved to "Retired Codesets" section



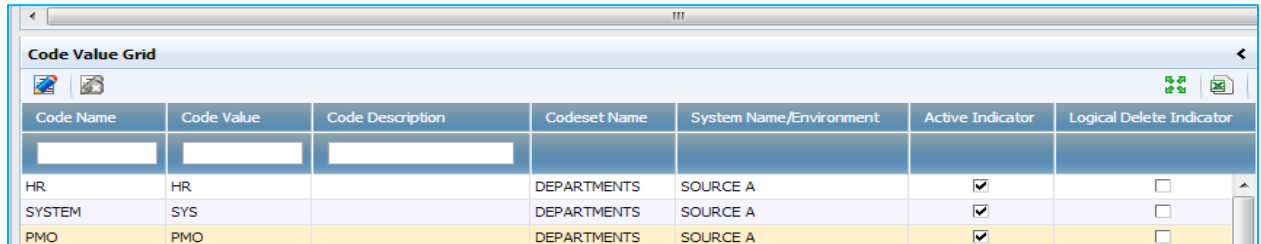
Populating Codesets - Defining Code Values

Code Values can be populated into a Codeset in 3 different ways

1. Manual Addition of Codes
2. Excel Import
3. Database Scan

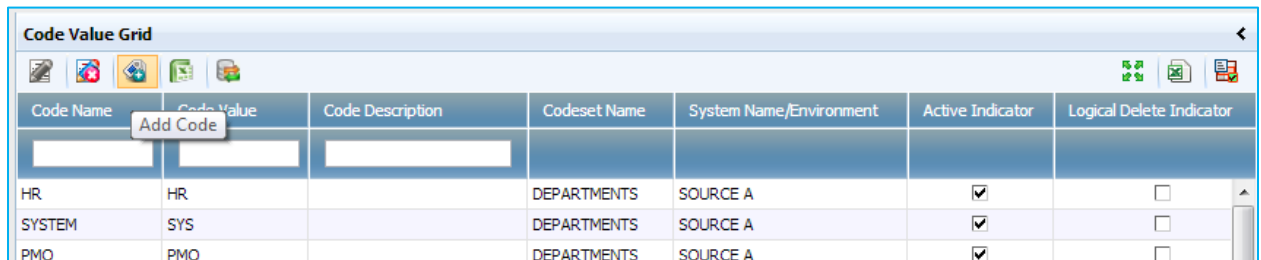
Manual Addition of Codes

1. To add data to a Reference table, first put the Codeset in the EDIT mode by clicking the "Pencil" icon



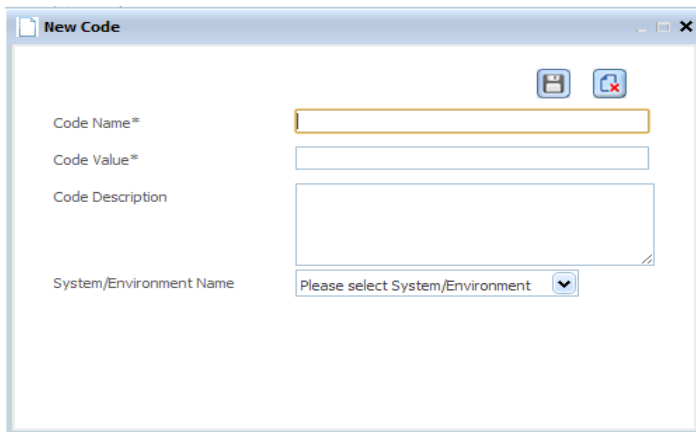
Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Logical Delete Indicator
HR	HR		DEPARTMENTS	SOURCE A	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SYSTEM	SYS		DEPARTMENTS	SOURCE A	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PMO	PMO		DEPARTMENTS	SOURCE A	<input checked="" type="checkbox"/>	<input type="checkbox"/>

2. Click the "Add Code" icon to add a new code



Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Logical Delete Indicator
HR	HR		DEPARTMENTS	SOURCE A	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SYSTEM	SYS		DEPARTMENTS	SOURCE A	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PMO	PMO		DEPARTMENTS	SOURCE A	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. A pop up is displayed containing the fields required to create a new code attribute. Enter the required fields and click the Save icon when done.



New Code

Code Name*

Code Value*

Code Description

System/Environment Name Please select System/Environment

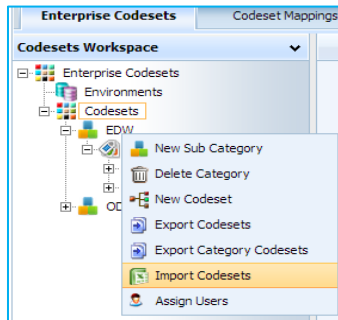
4. The new Code is successfully added to the Codeset

Important Note:

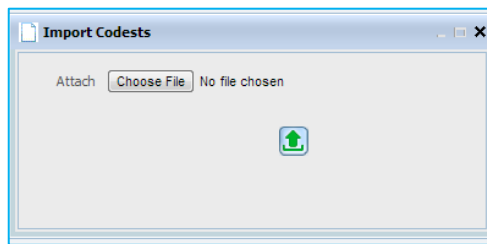
Codes can be stored independently or tied to a system and table and column of record. The Codeset Manager allows for both standardization of codes at an enterprise or corporate level or specification of valid and invalid codes which are associated to systems. If the code being entered is not associated to a system and is considered an 'enterprise standard' leave the system information blank, in which case these codes will be standalone and cannot be used as part of code crosswalks. If you are entering codes for a specified system - select the system to which you are associating the codes.

Excel Import: Uploading Multiple Codesets into a Category

1. Right click on a Category and select the "Import Codesets" option

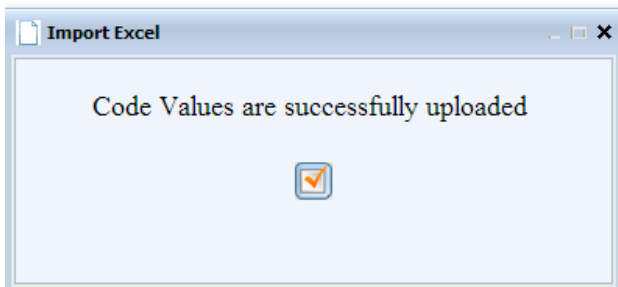


2. Browse and select the excel file that contains the list of Codes (along with their respective codesets).



	A	B	C	D	E	F	G
1	CODESET_NAME	CODE_NAME	CODE_VALUE	CODE_DESCRIPTION	SYSTEM_NAME	SYSTEM_ENV_NAME	ACTIVE_FLAG
2	Software	Test	T	Desc	Test System	n/a	Y
3	Software	Testing	Test		Test System	n/a	Y
4	Software	Development	Devl		Test System	n/a	Y
5	Eateries	Beverages	1	Soft drinks, coffees, teas, beers, and ales	Test System	SQL Server	Y
6	Eateries	Condiments	2	Sweet and savory sauces, relishes, spreads, and seasonings	Test System	SQL Server	Y
7	Eateries	Confections	3	Desserts, candies, and sweet breads	Test System	SQL Server	Y
8	Eateries	Dairy Products	4	Cheeses	Test System	SQL Server	Y
9	Eateries	Grains/Cereals	5	Breads, crackers, pasta, and cereal	Test System	SQL Server	Y
10	Eateries	Meat/Poultry	6	Prepared meats	Test System	SQL Server	Y
11	Eateries	Produce	7	Dried fruit and bean curd	Test System	SQL Server	Y
12	Eateries	Seafood	8	Seaweed and fish	Test System	SQL Server	Y
13	Eateries	Beverages	1	Soft drinks, coffees, teas, beers, and ales	Test System	SQL Server	Y
14	Eateries	Condiments	2	Sweet and savory sauces, relishes, spreads, and seasonings	Test System	SQL Server	Y
15	Eateries	Confections	3	Desserts, candies, and sweet breads	Test System	SQL Server	Y

3. When doing a Codeset upload at the Category level, the "Codeset Name" should be mandatorily specified in the excel template
4. Once the excel file is selected, click the Import icon. The code values are successfully imported into the Codeset.

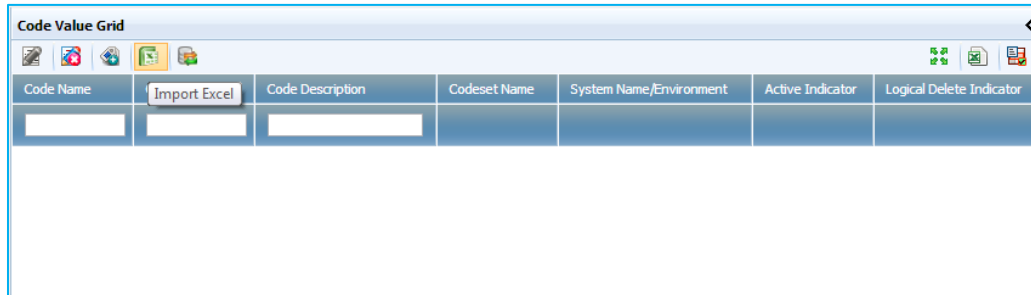


Error Logging Note:

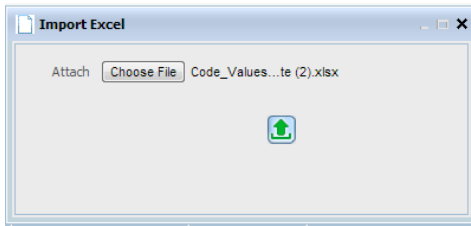
At the time of importing, any rows with errors are logged into an excel file and displayed to the user

Excel Import: Uploading a single Codeset into a Category

1. To import data from an Excel document, click the "Import Excel" icon



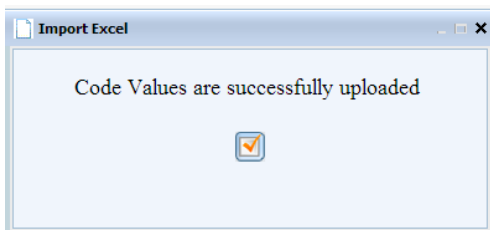
2. Browse and select the Excel file having the correct template



3. Sample excel template is displayed. To download the correct template, click the "Download" icon in the tool bar.

CODESET_NAME	CODE_NAME	CODE_VALUE	CODE_DESCRIPTION	SYSTEM_NAME	SYSTEM_ENV_NAME	ACTIVE_FLAG
MARITAL_STATUS	Mar	M		EDW		Y
MARITAL_STATUS	Sin	S		EDW		Y
MARITAL_STATUS	Div	D		EDW		Y
MARITAL_STATUS	Unk	U		EDW		Y
MARITAL_STATUS	NULL	NULL		EDW		Y

4. Once the excel file is selected, click the Import icon. The code values are successfully imported into the Codeset.



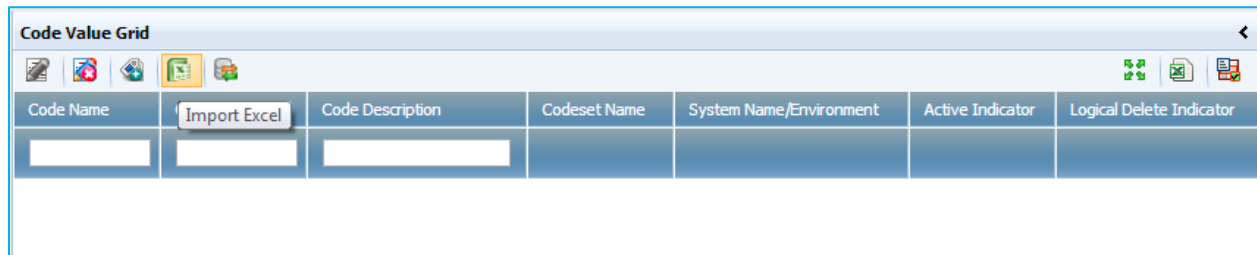
Code Name	Code Value	Code Description	Codeset Name	System Name/Environment	Active Indicator	Logical Delete Indicator
Mar	M		MARITAL_STATUS	EDW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sin	S		MARITAL_STATUS	EDW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Div	D		MARITAL_STATUS	EDW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Unk	U		MARITAL_STATUS	EDW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NULL	NULL		MARITAL_STATUS	EDW	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Error Logging Note:

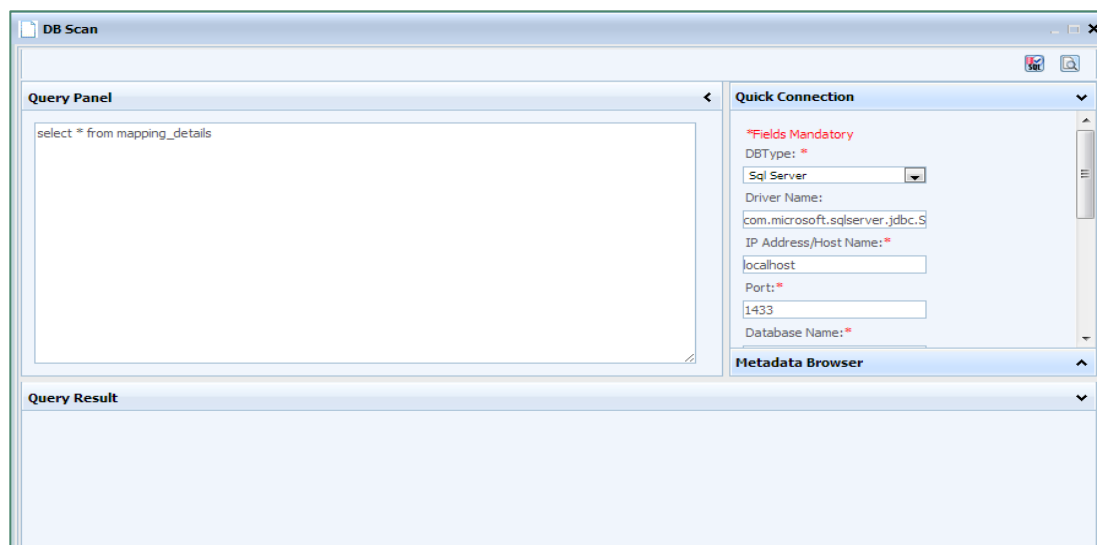
At the time of importing, any rows with errors are logged into an excel file and displayed to the user

Database Scan:

Click on the DB scan icon to open a DB Scanning dialog box

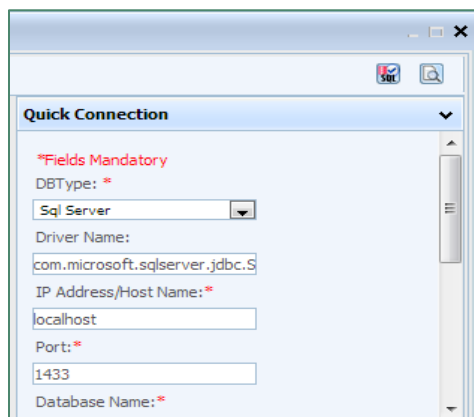


The DB Scan dialog box contains a text area to enter the SQL Query. At the far right, options to connect to the DB environment are provided.



Option1: Quick Connection

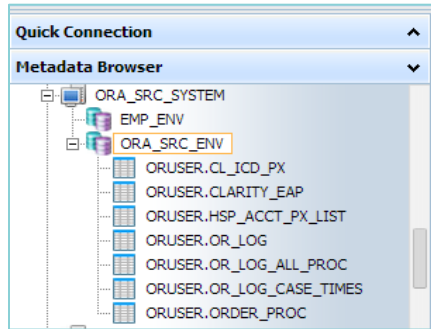
This option can be used to scan data from DB environments that are not available within Mapping Manager. Using this option, the connectivity parameters can be entered for a Database and the query can be run against this database.



Enter the connectivity parameters to connect to the database and click the "Test Connection" option to establish connection.

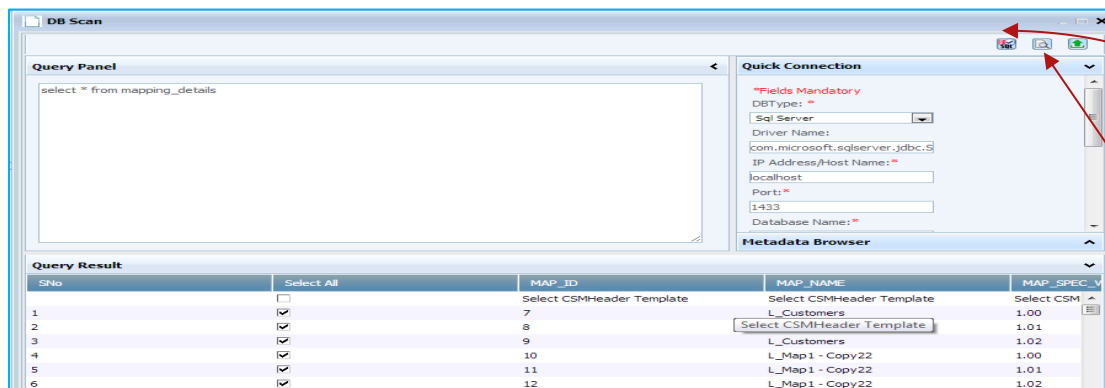
Option2: Metadata Browser

This contains the list of all System Environments that have been scanned and are available in the Mapping Manager. Select a System Environment from the list of Environments available and run the SQL Query against this environment.



Select an Environment by clicking the Environment

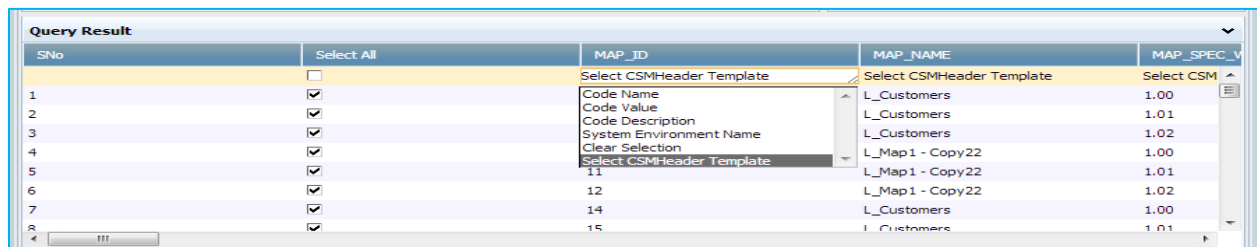
Once the correct connectivity parameters have been provided and the SQL query is entered, click the "Validate" icon to validate the query (check whether sql statement correctly executes or not) and click the "Execute" icon to execute the query and display the result set.



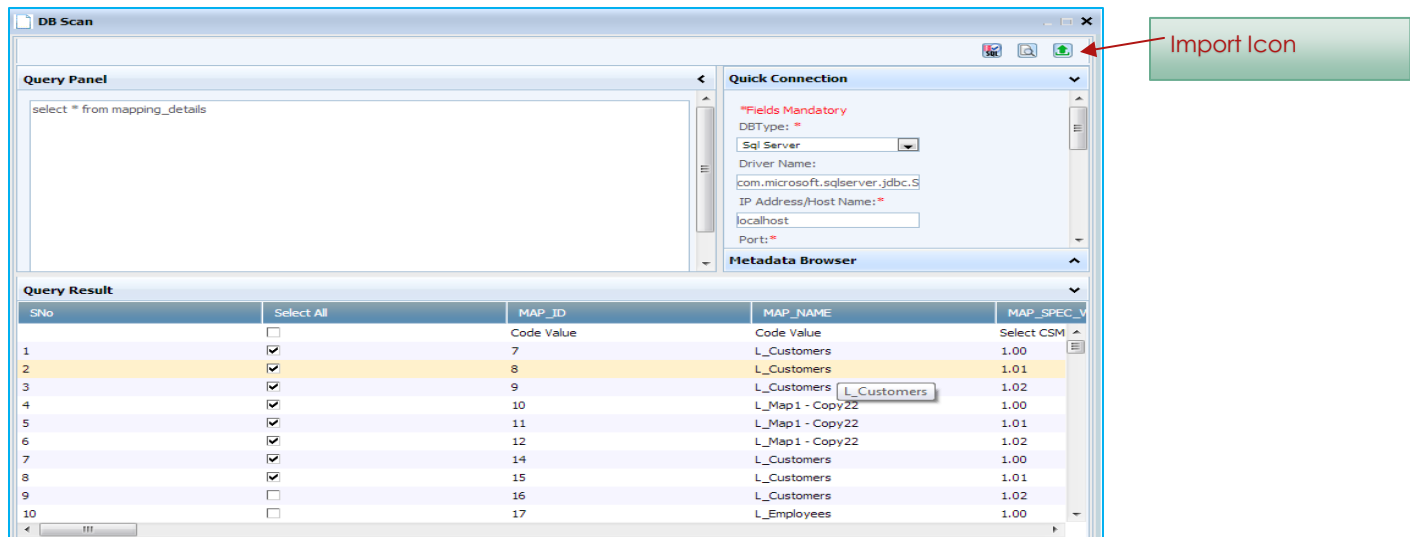
Validate icon

Execute icon

Once the result set is displayed, map the headers from the output to the standard headers

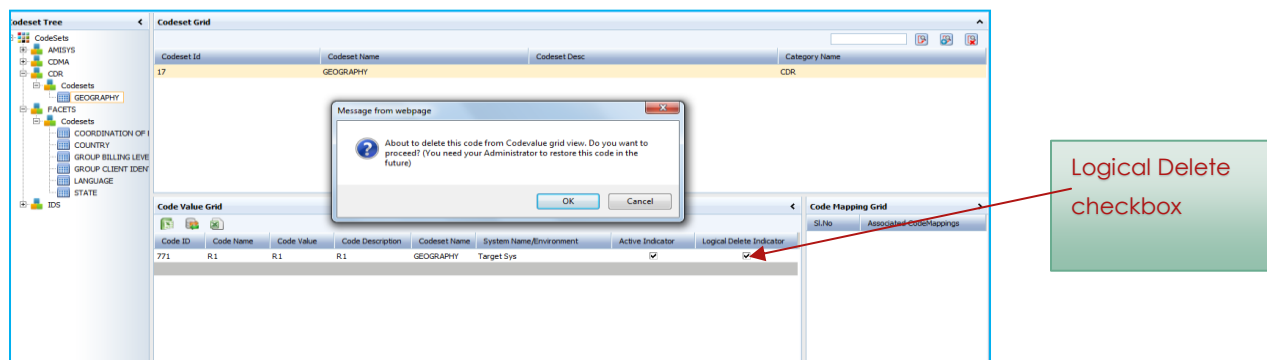


Select the required rows for import by selecting the required checkboxes and then click the "Import" icon

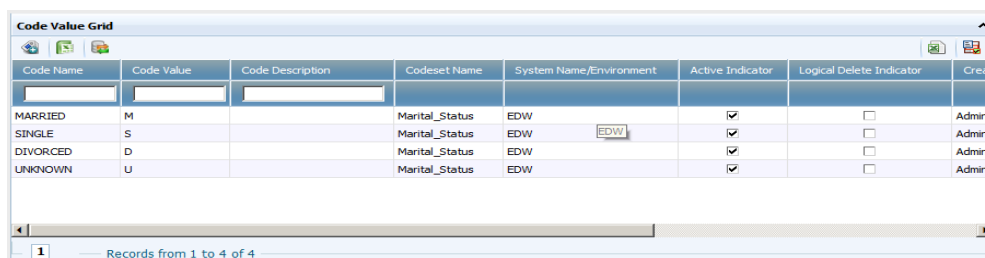


Deleting Codes:

1. To soft delete a Code, select the "Logical Delete" indicator checkbox as shown. A confirmation message is displayed to the user.



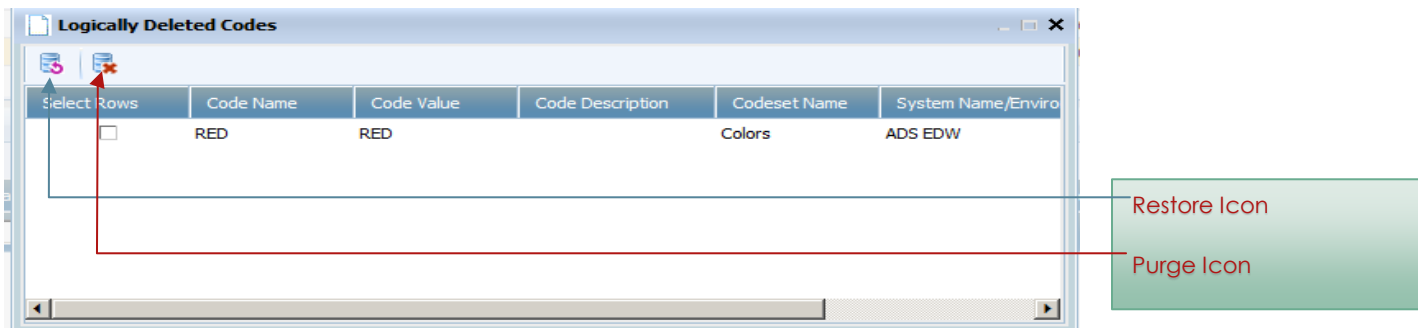
2. If the User clicks OK, the Code is logically deleted (removed from view but still present in the database).



Restoring or Purging temporarily deleted codes:

***This functionality is only available to the Administrator and Power User roles.

Click on the icon on the Code Value grid. This will bring up a pop-up window showing all logically deleted codes.



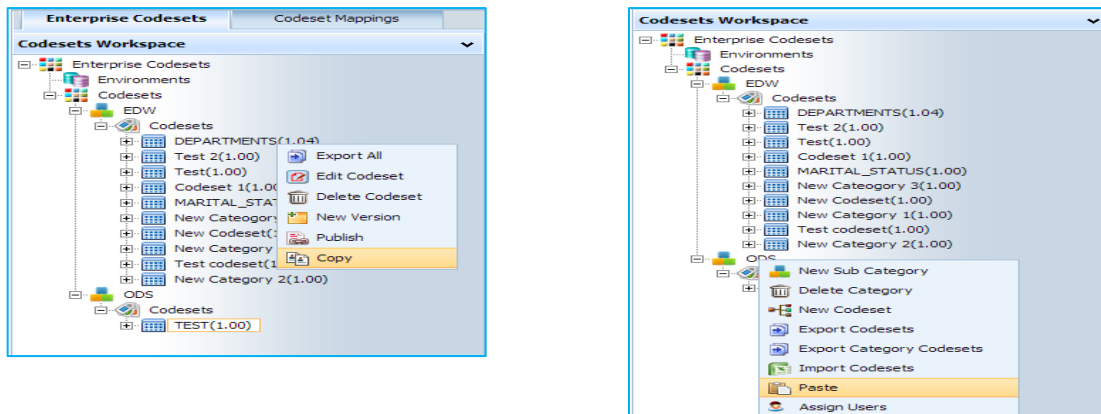
To Restore Codes: Select the required codes and click the restore icon. The selected codes will be restored to the Codeset.

To Purge Codes: Select the required codes and click the Purge icon. The selected codes will be permanently deleted from the database.

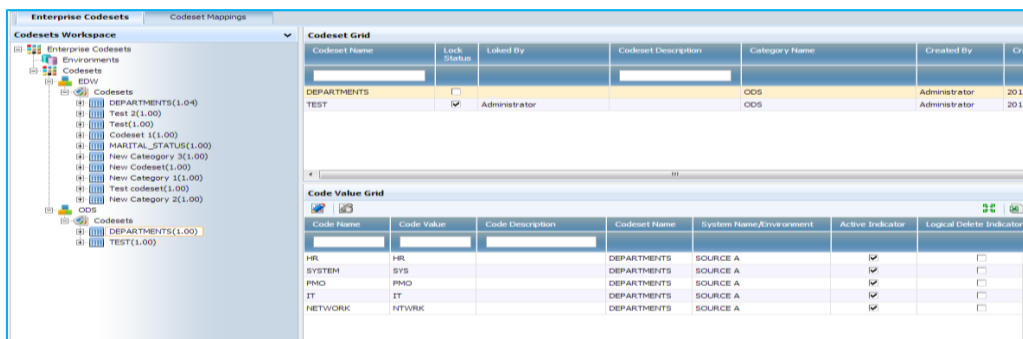
Copy/Paste Codesets from one Category to another

The Codeset manager module facilitates quick and easy copy/paste of codesets into various folders

To copy a codeset, right click on the codeset and select the "Copy" option. Go into the destination folder, right click and select the "Paste" option.



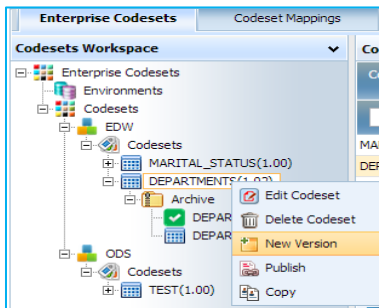
The Codeset is successfully pasted into the destination folder.



Note: if the Codeset being copied already exists in the destination folder, the system will display a dialog box to enter version related information and a new version of the Codeset will be created in the destination folder.

Versioning Codesets

To version a Codeset, right click on the Codeset and select the "New Version" option



Enter the Version Label and Change Description and click the Save icon when done.

The 'New Codeset version' dialog box is shown. It contains the following fields:

- CodeSet Name: DEPARTMENTS
- CodeSet Version: 1.03
- CodeSet Description: (empty text area)
- CodeSet Version Label: (empty text field)
- CodeSet Changed Description*: (empty text area)

 There are 'Save' and 'Cancel' icons at the top right.

A new version is created which is now the active / writeable copy of the Codeset while the previous version is now archived and read-only.

The screenshot shows the 'Enterprise Codesets' workspace with the 'Codeset Grid' and 'Code Value Grid' visible. The 'Codeset Grid' table is as follows:

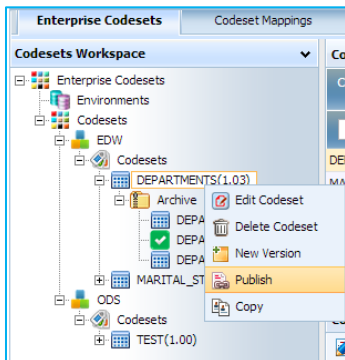
Codeset Name	Lock Status	Locked By	Codeset Description	Category Name	Created By	Created Date Time	Last Modified
DEPARTMENTS	<input type="checkbox"/>			EDW	Administrator	2013-11-08 04:39:07.193	Administrator
MARITAL_STATUS	<input checked="" type="checkbox"/>	Administrator		EDW	Administrator	2013-11-07 14:43:41.61	Administrator

The 'Code Value Grid' and 'Code Mapping Grid' are also visible at the bottom of the interface.

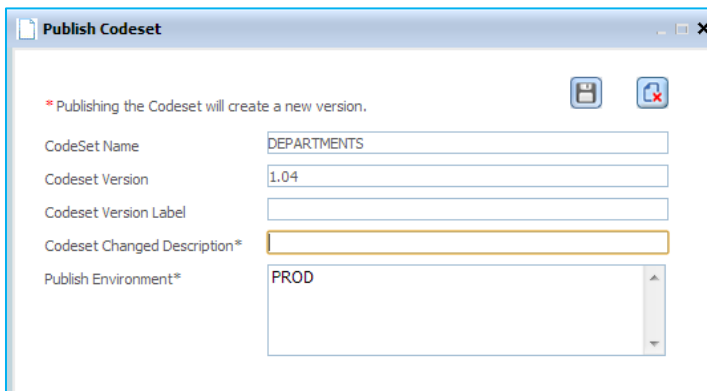
All archive information can be viewed by clicking the "Archive" folder option.

Publishing Codesets:



To Publish a Codeset, right click the Codeset and select the "Publish" option

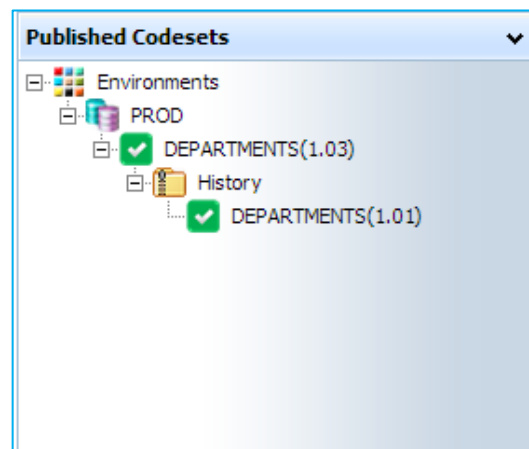
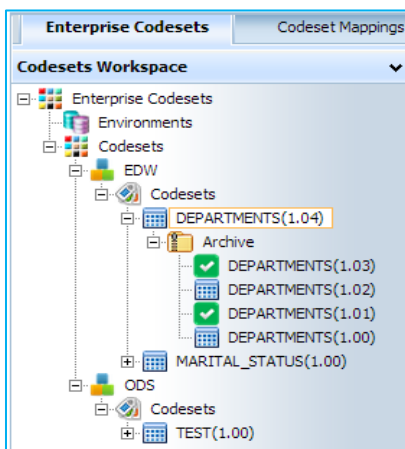


Enter Change Description and select the environment to which this reference table needs to be published to and click the save icon. Click [here](#) to learn about publishing environments



A new version is created which is now the active / writeable copy of the Codeset and the previous version is now archived, published and read-only.

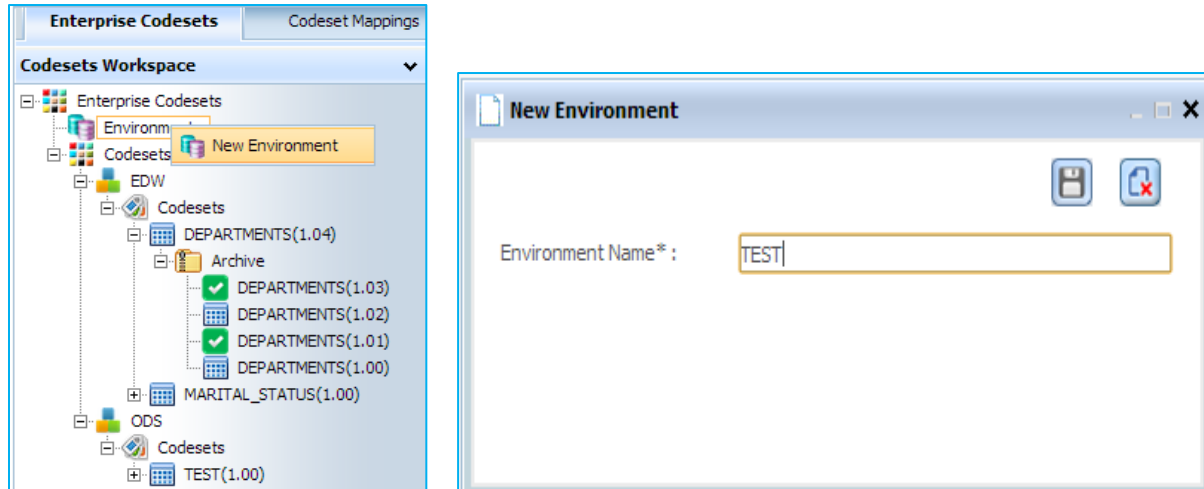
All published Codesets are indicated using the  icon and are displayed in a published folder grouped into publishing environments. They are also visible under the Archive folder of the Codeset indicated by the same  icon.



Define Publishing Environments

Codesets can be published to various environments like DEV, TEST, and PROD etc.

To define a publish environment, right click the "Environments" node and select the "New Environment" option, key in the name and click save.



All existing Environments can be viewed by clicking the "Environments" node

The image shows the 'Enterprise Codesets' workspace with the 'Environments' node selected. The main area displays a table titled 'Publish Environments'.

S.NO	Environment Name	Created By	Created Date	Modified By	Modified Date	Edit	Delete
1	TEST	Administrator	2013-11-08 04:46:56.534				
2	PROD	Administrator	2013-11-08 04:34:34.741				

Using the User Defined Flex Fields

There are seven properties that are captured at the row level for a Codeset. If there is an element that is not captured and labeled as per your specification we have also provided the use of 10 flexible User defined fields that can be used any way you deem appropriate at the row level.


User Defined Field 1	User Defined Field 2	User Defined Field 3	User Defined Field 4	User Defined Field 5	User Defined Field 6	User Defined Field 7	User Defined Field 8	User Defined Field 9	User Defined Field 10
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Customize the User Defined Flex fields

The User defined flex fields 1-10 can be renamed according to the user preferences.

Go into the Mapping Manager's settings screen by clicking on the "Settings" icon. Click on the "Miscellaneous" tab and next on the "Language Settings" tab.

Language Settings			
Key Description	ENGLISH	CHINESE	FRENCH
Business Glossary Manager	Business Glossary Manager		
Permissions	Permissions		
Code Automation Templates	Code Automation Templates		
MigrationStatus	MigrationStatus		
Codeset Manager	Codeset Manager		
HistoryType	HistoryType		
Mapping Manager	Mapping Manager		
Environments	Environments		
User Defined Flex Fields	User Defined Flex Fields		
Tool Tip	Tool Tip		
Global Search	Global Search		
MigrationObjectType	MigrationObjectType		
Reference Data Manager	Reference Data Manager		

Expand "Codeset Manager" and rename the User defined fields and click on the Save button  to save the changes

Key Description	ENGLISH	CHINESE
Start Date	Start Date	
Code Value	Code Value	
Delete Indicator	Delete Indicator	
User Defined Field 1	User Defined Field 1	
User Defined Field 2	Rename As Required	
User Defined Field 3		
User Defined Field 4		
User Defined Field 5	User Defined Field 5	
User Defined Field 6	User Defined Field 6	
User Defined Field 7	User Defined Field 7	
User Defined Field 8	User Defined Field 8	

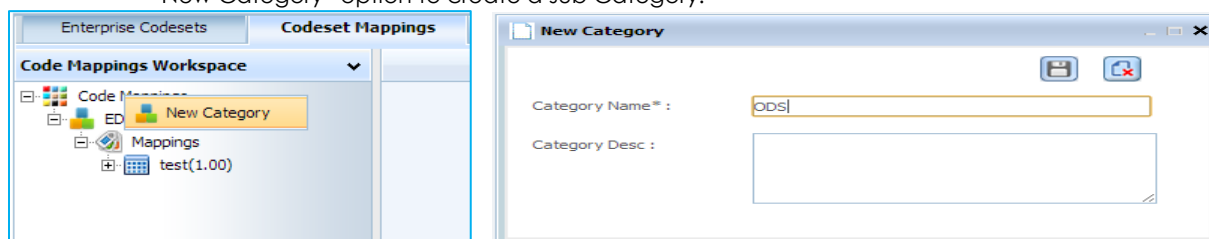
Maintaining Code Crosswalks/Mappings

- ✓ Categorize Code Mappings and define Code Crosswalks
- ✓ Version Code Mappings
- ✓ Copy and Paste Code Mappings
- ✓ Publish Code Mappings to various deployment Environments
- ✓ Associating a Code Crosswalk to a Data Item Mapping in the Mapping Manager module

Categorize Code Mappings

Create Category

1. Right click on the "**Code Mappings**" node and click "**New Category**"
2. Enter the "**Category Name**" and "**Category Description**" and click the "Save" button. New Category is successfully created.
3. Sub Categories can be created within Categories. Right click on a specific Category and select the "New Category" option to create a sub Category.



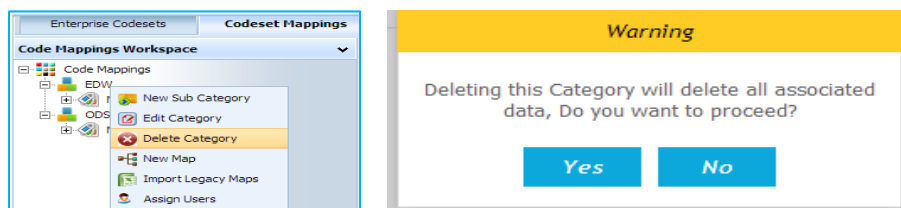
Update Category

1. Right Click on a Category (e.g. EDW) and select the "Edit Category" option.
2. Enter the required details and click the "Save" button. The changes are successfully updated.



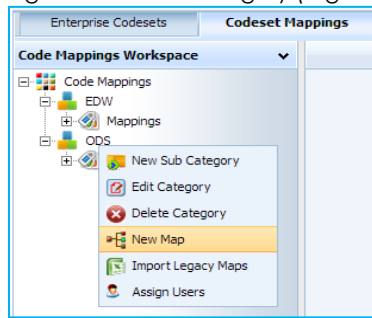
Delete Category

1. Right click on a Category (e.g. EDW) and select the "Delete Category" option
2. A confirmation dialog box is displayed. Click YES to proceed and NO to abort



Create Code Crosswalks/Mappings

1. Right Click on a Category (e.g. ODS) and select the "New Map" option



2. Enter the required details and click the "Save" button. Code Mapping is successfully created.

3. Enter Map Name, Description.
4. Select the Source Codeset /System and Target Codeset/System.
5. Based on the selection of source/target Codesets and their corresponding systems, source codes will be auto-populated for the mapping. All target codes will be populated in the "target code value" in the form of a dropdown so that the target codes can be mapped to the source codes.

ent	Source Category	Source Code set	Source Code Description	Source Code Name	Source Code Value	Source Code ID	Target Code ID	Target Code Name	Target Code Value	Target Code Description
	FACETS	COUNTRY		United States	USA	44				
	FACETS	COUNTRY		Canada	CAN	45				
	FACETS	COUNTRY		Mexico	MEX	46				
	FACETS	COUNTRY		United Kingdom	UK	47			UK USA CAN MEX NA INVL	
	FACETS	COUNTRY		India	IND	768				
	FACETS	COUNTRY		JAPAN	JP	770				

Map Name :	COUNTRY_MAP	Edit
Map Version :	1.00	

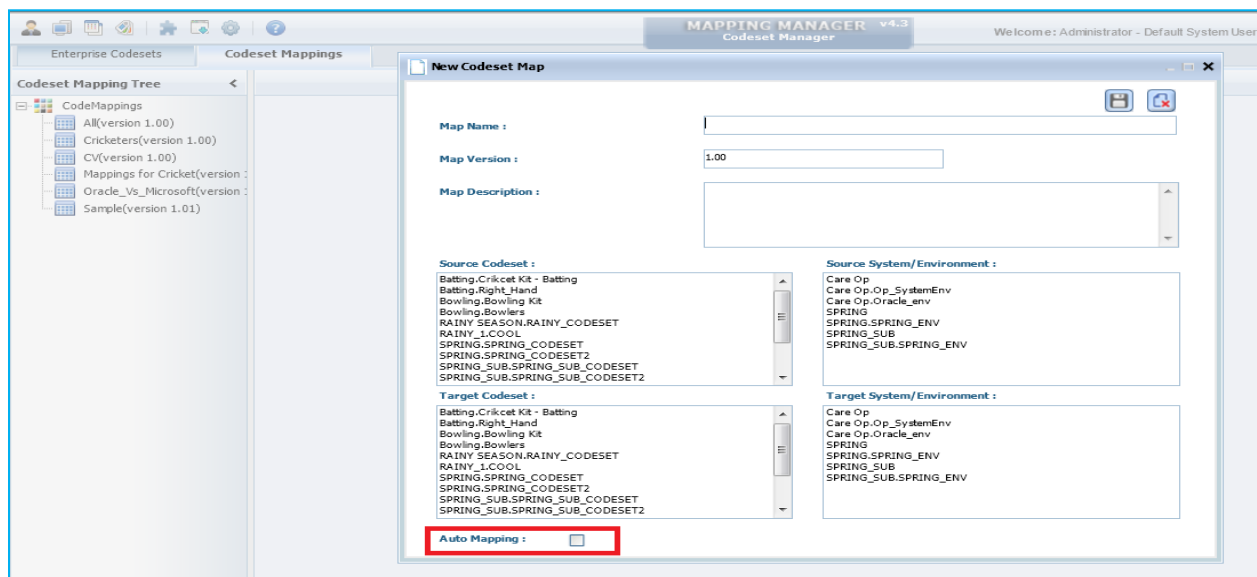
Note: Target Codeset will also display as a tree structure so that the entire Target Codeset can be dragged/dropped onto the grid for mapping. Only Target Codeset can be dragged/dropped for mappings. Source Codesets need to be selected via the above procedure.

Note: Only the active version of the Codeset is displayed in the Drop Down for Source/Target Codesets
The mapping grid is displayed for the newly created code mapping with the sources auto populated and the target codes available in a drop down at the row level to map.
Click the Save icon to put the map in an editable mode. Assign the target codes to the source codes.
Click the Save icon to save the mapping

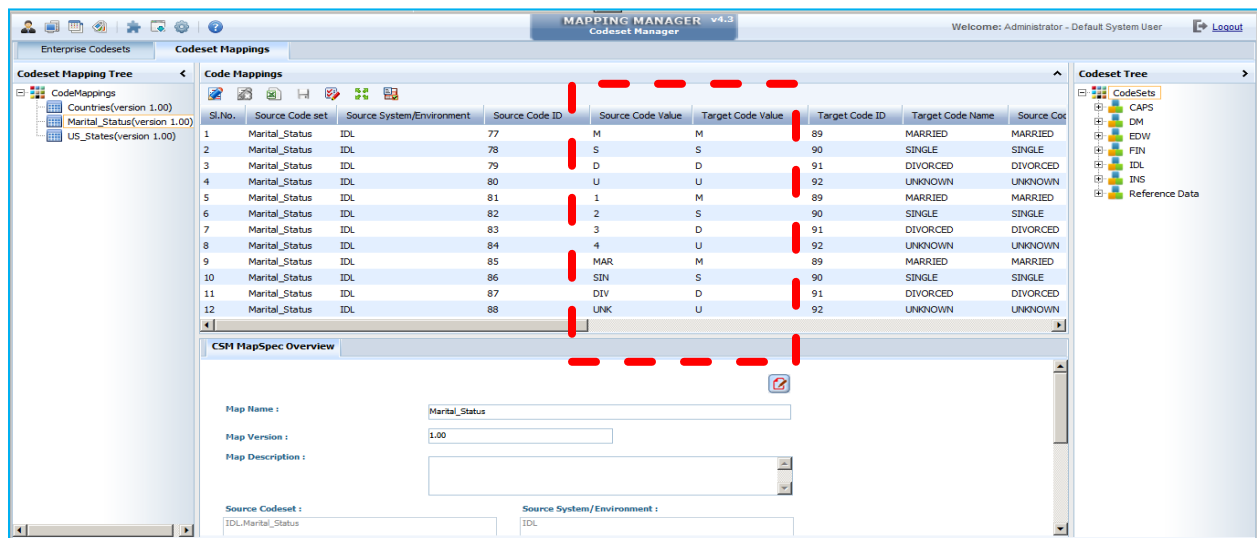
Auto Mapping of Source/Target Codes

Auto Map Source Target Codes:

If the Source and Target Codesets contain the exact same code values, the user can select the corresponding source and target Codeset and select the "Automap" checkbox.



All source codes will be mapped to their corresponding target codes where the source code is exactly the same as the target code (e.g. **IND** (source) and **IND** (target)).



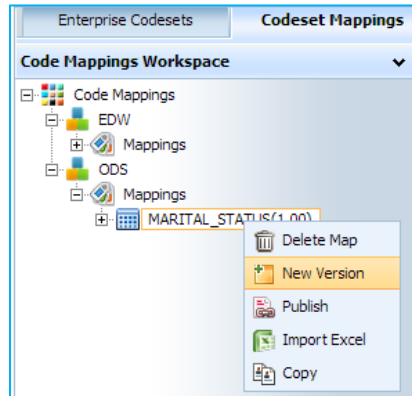
Target Mapping codes which are an exact match of the Source Codes will be automatically mapped to the corresponding source codes.

Non-matching target codes (i.e. not the same as Source code) will have to be manually mapped by the user.

Note: Please make sure always to choose the Codesets and their corresponding Systems / Environments to use them as part of Code Mappings.

Version Code Crosswalks/Mappings:

1. To version a Code Mapping, right click on the Code Mapping and select the "New Version" option



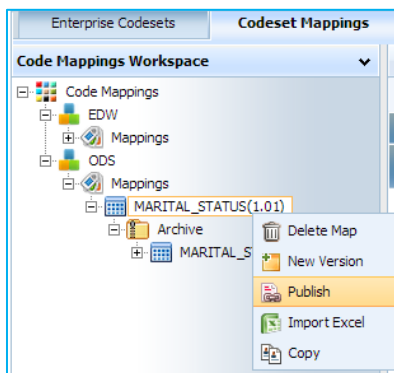
2. Enter the Version Label and Change Description and click the Save icon when done.

3. A new version is created which is now the active / writeable copy of the code mapping and the previous version is now archived and read-only
4. All archive information can be viewed by clicking the "Archive" folder option

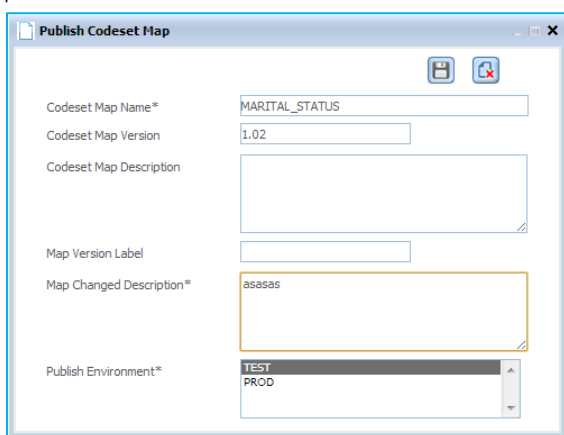
S.No.	Source Category	Source Code set	Source System/Environment	Source Code Description	Source Code ID	Source Code Name	Source Code Value	Target Code Value	Ta
1	EDW	MARITAL_STATUS	EDW		10	Mar	M		
2	EDW	MARITAL_STATUS	EDW		11	Sim	S		
3	EDW	MARITAL_STATUS	EDW		12	Div	D		
4	EDW	MARITAL_STATUS	EDW		13	Unk	U		
5	EDW	MARITAL_STATUS	EDW		14	NULL	NULL		

Publish Code Crosswalks/Mappings:

1. To Publish a Code Mapping, right click the Code Mapping and select the "Publish" option





2. Enter Change Description and select the environment to which this reference table needs to be published to.



3. A new version is created which is now the writeable copy of the mapping and the previous version is now archived, published and read-only

The screenshot shows the 'Published Code Mappings' view in the Erwin application. It displays a table with the following columns: S.No., Source Category, Source Code set, Source System/Environment, Source Code Description, Source Code ID, Source Code Name, Source Code Value, Target Code Value, and Target Code Name. The table contains 5 rows of data.

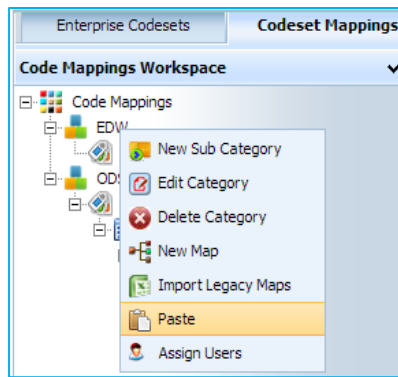
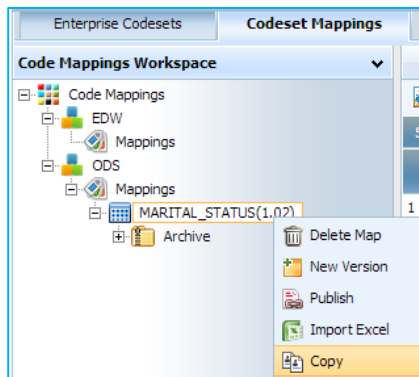
S.No.	Source Category	Source Code set	Source System/Environment	Source Code Description	Source Code ID	Source Code Name	Source Code Value	Target Code Value	Target Code Name
1	EDW	MARITAL_STATUS	EDW		10	Mar	M	HR	HR
2	EDW	MARITAL_STATUS	EDW		11	Sin	S	IT	IT
3	EDW	MARITAL_STATUS	EDW		12	Div	D	NTWRK	NET
4	EDW	MARITAL_STATUS	EDW		13	Unk	U	PMO	PMC
5	EDW	MARITAL_STATUS	EDW		14	NULL	NULL	SYS	SYS

All published mappings are indicated using the  icon and are displayed in a published folder grouped into publishing environments. These mappings are also visible in the Archive folder of their respective active Maps indicated by the same  icon.

Copy/Paste Code Crosswalks/Mappings from one Category to another:

The Codeset manager module facilitates quick and easy copy/paste of code mappings into various folders

To copy a code mapping, right click on the code mapping and select the "Copy" option. Go into the destination folder, right click and select the "Paste" option.



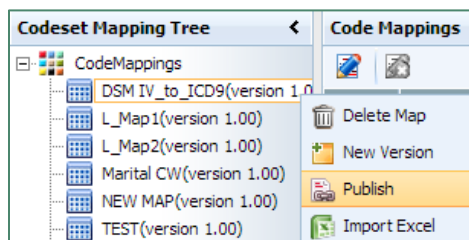
The code mapping is successfully pasted into the destination folder.

S.No.	Source Category	Source Code set	Source System/Environment	Source Code Description	Source Code ID	Source Code Name	Source Code Value	Target Code Value
1	EDW	MARITAL_STATUS	EDW		10	Mar	M	HR
2	EDW	MARITAL_STATUS	EDW		11	Sin	S	IT
3	EDW	MARITAL_STATUS	EDW		12	Div	D	NTWRK
4	EDW	MARITAL_STATUS	EDW		13	Unk	U	PMO
5	EDW	MARITAL_STATUS	EDW		14	NULL	NULL	SYS

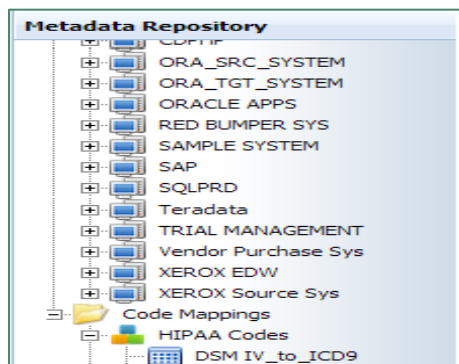
Note: if the code mapping being copied already exists in the destination folder, the system will display a dialog box to enter versioning information and a new version of the code mapping will be created in the destination folder.

Associating a Code Crosswalk to a Data Item Mapping in the Mapping Manager module

The Published Code Mappings will be reflected in the metadata repository under the Code Mappings folder.



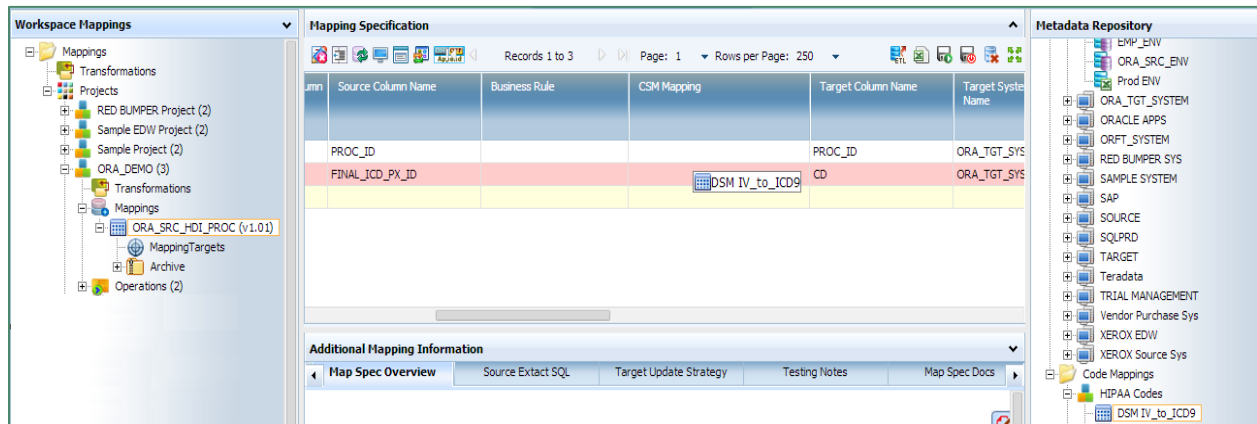
Publish Mappings in Codeset Manager



These published Code Mappings are displayed under the "Code Mappings" node in the metadata browser of the Mapping Manager module.

The code mappings will be organized according to the category related to the target codeset (e.g., HIPAA Codes) as depicted in the image.

The code mapping / crosswalk can thus be referenced to a specific row of a Source to Target mapping.



In the Mapping Manager, select a specific Mapping and click the edit icon. In the Mapping grid associate the required code map by dragging and dropping the specific code map from the metadata repository to the "CSM Mapping" field of the mapping row of interest.

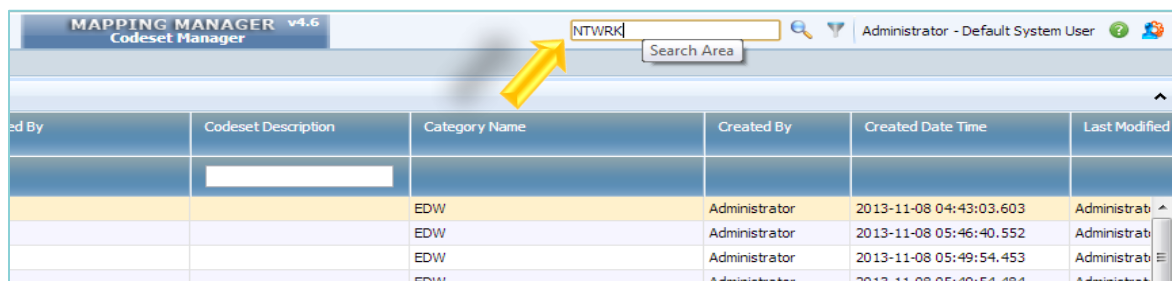
Click the save icon to successfully associate the code crosswalk to a specific map row.



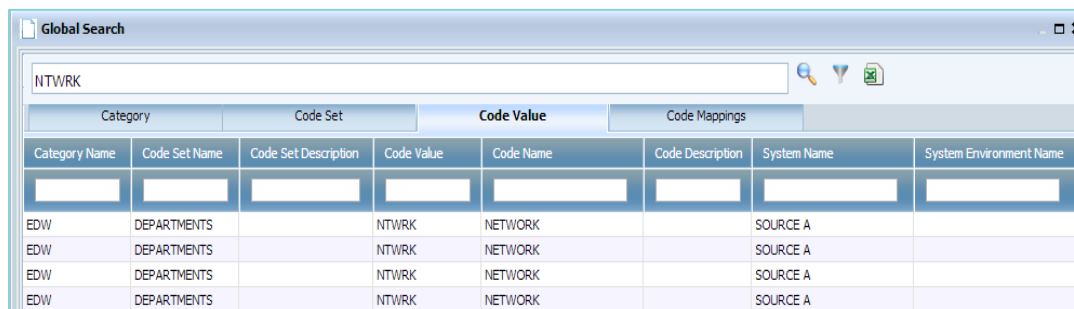
Global Search across Codeset Repository

The Codeset manager module facilitates quick and easy search of Codesets and Code Mappings.

To search any piece of data, enter the keyword in the global search text field and click the search icon.



A **LIKE** search is executed on the entered keywords i.e. %KEYWORD% and all search results across the universe of Codesets, Code Mappings and their attributes are displayed.



These search results can be exported into an Excel document .